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ABSTRACT

This seasonal project integrates the skills of typing, photocopying, calculating, composing, alphabetizing, and human relations, which the student has acquired during the first part of the Administrative Support Occupations II course. The activity is a simulation that involves a small, specialty, mail-order business selling novelty items for holiday occasions. Students act as clerk-typists employed by this organization. Materials are provided for these problems: composition and typing of replies to all incoming correspondence (following instructions noted on the letter), including preparation of needed invoices, checks, and telegrams; completion of extensions on a stock record inventory form; ordering by letter of depleted stock; making of reservations; completion of a human relations problem; preparation and alphabetization of postal cards from a mailing list; and submission of all work. (YLB)

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THE HOLIDAY SHOP

AN INTEGRATED PROJECT FOR ADMINISTRATIVE SUPPORT OCCUPATIONS II

TO BE USED

THE WEEKS PRECEDING THE CHRISTMAS HOLIDAYS

T H E S T O R Y . . . .

The Holiday Shop is a small, specialty, mail-order business selling novelty items for holiday occasions. It has no retail outlets, handling all sales through the mail.

You are one of five clerk typists employed by this organization. Your officers include Charles B. St. Nick, President; Kris Krenkle, Vice President; Merry Noel, Secretary and Cashier.

T H E P R O B L E M . . . .

Because of the rush associated with the approaching Christmas season, your employers do not have time to dictate replies to incoming mail. They read all correspondence and make notations at the bottom of each letter, giving the typist general instructions for answering. Following their directions, you are to complete this work in the sequence given below.

1. Compose and type replies to all incoming correspondence in order received. Follow directions as noted on each letter, preparing needed invoices, checks, and telegrams. Prepare one copy of each letter. The beginning bank balance is $2,500.

2. Complete extensions on stock record inventory form. Order by letter depleted stock.

3. Make reservations as directed by employer.

4. Complete the human relations problem.

5. Prepare postal cards from mailing list and put in alphabetical order.

6. Organize all work in order indicated and submit in a file folder to your instructor.

THE OBJECTIVES . . .

To integrate the skills of typing, photocopying, calculating, composing, alphabetizing, and human relations which the student has acquired during the first part of the course.

PERFORMANCE STANDARDS

1. Typing. Given nine letters, nine envelopes, plain paper, three invoices, three checks, two telegrams, and thirty-six postal cards, the student will type these materials in correct form. All typing errors will be neatly corrected.

2. Calculating Machines. Given three invoice problems containing errors in both extensions and discounts, the student will correct the errors and prepare new invoices. Given forty incomplete extensions on eight stock record inventory cards, the student will use the processes of addition, subtraction, and multiplication to complete this work.

3. Composition. Given nine situations involving correspondence to be answered, the student will compose appropriate replies. Grammar, punctuation, and spelling will be correct.

4. Alphabetizing. Given thirty-six typewritten postal cards, the student will alphabetize.

5. Human Relations Problem. Given one human relations problem, the student will list the alternatives available and choose the one that is most appropriate, giving the reasons for the choice. As this problem involves personal opinion, there is no "correct" or "incorrect" response.

3131 Webster Avenue
Chesapeake, VA 23325
December 7, 19--

The Holiday Shop
25 Mistletoe Lane
Snowflake Falls, MN 55084

Gentlemen

A shipment of damaged Christmas three ornaments is being returned to you today by UPS.

The package I received yesterday was not insured; and I, therefore, have no other alternative but to return to you the damaged merchandise. I shall expect a prompt refund.

May I suggest that you improve your packing of such fragile ornaments in order to eliminate such occurrences in the future.

Yours truly

Bernard F. Austin

Write a letter of apology. Enclose a check in the amount of $10.43 which covers the purchase price and postage.

K. K.

16 W. Palm Street
Christmas, FL 68904
December 8, 19--

THE HOLIDAY SHOP
25 Mistletoe Lane
Snowflake, MN 55804

Gentlemen

Today I received the important (chrystal) crystal candelabra that I ordered from your company sometime ago. I was very distressed to find that it had been badly damaged in transit. I cannot accept this merchandise in this condition; therefore, I am returning it to you.

Since I need this particular candelabra to complete a pair I would like to reorder. Would you please send it special delivery and special handling.

Sincerely

Florence Holly

Write a letter to Ms. Holly with regrets for the condition the candlelabra arrived in and tell her we are reshipping the order immediately.

Also write the Statewide Insurance Co. in Snowflake Falls and report the broken candlelabra, establishing our claim for this #275 loss.

CBS

Box 23
Manteo, NC 27954
December 8, 19--

The Holiday Shop
25 Mistletoe Lane
Snowflake, MN 55804

Gentlemen

Thank you for the prompt shipment of merchandise I ordered recently.

If you will check invoice No. 437, however, you will note that the following items were incorrectly figured:

1) 25 stockings @ $4.98 e
2) 50 cases of Christmas balls @ $5.98 a case
3) 40 sets of indoor-outdoor lights @ $9.98

Please send a corrected invoice so that payment may be made immediately.

Yours truly

Sam E. Midgett, Sr.

Check extensions carefully. Write Mr. Midgett enclosing the correct invoice.

-- M. N.

7

4949 South Maine Avenue
Richmond, VA 23219
December 10, 19--

The Holiday Shop
25 Mistletoe Lane
Snowflake, MN 55804

Gentlemen

The invoice you sent me is incorrect. I ordered the #6328J Santa Claus suit with white rabbit fur on the cap. This was listed in your catalog for $35.50 plus a four percent discount if paid within ten days. Why are you charging me $45.50 and no discount is allowed?

Please send corrected invoice, showing proper amount of discount, so I can pay my bill before Christmas.

Sincerely yours

George Gorge

Tell customer we were out of #6328J, so sent better quality merchandise. However, intended to charge only #35.50 less 4% discount. Write letter of explanation and enclose invoice showing discount.

R. R.
KK

301 Fifth Avenue
Galax, VA 24333
December 10, 19--

Mr. Charles B. St. Nick
THE HOLIDAY SHOP
25 Mistletoe Lane
Snowflake Falls, MN 55804

Dear Mr. St. Nick

On December 1, I ordered a Japanese Christmas bell, No. B33-6890, listed in your catalogue for $7.95. The bell has arrived, but you have charged the incorrect price of $9.95.

I also thought that if I paid cash I would be allowed a discount.

Will you please send a corrected invoice and inform me about the discount and I will then send you my check in the full amount.

Sincerely

Harry Redd

Send corrected invoice and write a letter of apology to Mr. Redd for quoting the incorrect price. Give him the full 5% discount.

C. B. S.

P.O. Box 8
Hillsville, VA 24343
December 11, 19--

THE HOLIDAY SHOP
25 Mistletoe Lane
Snowflake, MN 55804

Gentlemen

Recently I ordered from your Company 12 large Christmas candles and holders in kelly green, No. B36, HA 5293, at $3.25 each. When they arrived, they were mint green instead of kelly green. I cannot use these candles because they do not go with the color scheme I am using for an office Christmas party I am giving.

I have no alternative other than to return them to you and ask for a refund for $39.00.

Sincerely

Betsy Green

Write Ms. Green. We are happy to refund her purchase price. Check the extension and write the check.

R. R.
KK

Please send the following wires as tracers for the lost merchandise mentioned in letter attached:

One telegram to N. W. Freight, 2560 S. Grant Street, Butte Montana and second telegram to Homeland Exp., 8989 Michigan Blvd, Chicago, Ill. "Tracing five ctns. shipped 11/20 B/L A76498 via N. W. Freight and Homeland Exp. to J. Jones, Municipal Bldg., Smalltown, Indiana. Urgently needed. Locate. Rush to destination, wiring us whereabouts.

St. N.

Write Mr. Jones that we have sent telegrams tracing shipment and will telephone him as soon as they are located. Apologize for inconvenience and assure him we are doing everything possible to get mdse. to him.

Municipal Building
Smalltown, IN 45678
December 12, 19--

The Holiday Shop
25 Mistletoe Lane
Snowflake, MN 55804

Ladies and Gentlemen

Three weeks ago I received a copy of your bill of lading NUMBER A76498 dated November 20, 19--. This covered a shipment of 20 dozen outdoor tree lights to be used in lighting our municipal Christmas tree. These lights were packed in four cartons, and shipped via Northwest Freight Lines to Chicago, then transferred to Homeland Express Company for delivery to us here in Smalltown. We must have these lights immediately, and feel they are lost in transit. All the folks in Smalltown will be very disappointed if the lights for their tree fail to arrive for the tree lighting ceremony this weekend.

I will expect to hear from you by return mail.

Sincerely

John J. Jones, Mayor

See attached sheet for instructions.

—St. N.

TO _____ DATE _____

____ For Your Information ____ As Requested

____ For Your Files ____ Return to _____

____ For Your Signature ____ Please Share

__x__ Please Handle ____ Thank You

____ Your Reaction Please

REMARKS: _____

Because the clerk in charge of stock inventory has been ill, her records are not up to date. Check the inventory forms and complete the extensions where necessary.

Remember we order when any quantity is within ten of the minimum, and we order a sufficient amount to bring the stock supply up to the ~~minimum~~ maximum quantity. Write a letter for my signature ordering any needed supplies.

St. Nick

ARTICLE Tree Ornaments SOURCE John Plain, Inc.
400 Bayview Blvd.
Chicago, Illinois 20645

Stock Number T4495 Unit Doz. Minimum Quantity 100 Maximum Quantity 800 Price Per Unit 9.00

ORDERED			STOCK RECORD						
Date	Order No.	Quantity	Date	Requisition No.	Quantity Issued	Order No.	Quantity Received	Balance on Hand	Cost Value Price x Balance
			1/1					450 1/2	4,054.50
8/2	1560	349 1/2	8/26			1560	349 1/2		
			9/10	856	246				
			9/26	957	211 1/2				

ARTICLE Christmas Bells SOURCE Christmas Bell Company
800 Webb Ave.
Richmond, Va. 23219

Stock Number B442T Unit Doz. Minimum Quantity 40 Maximum Quantity 480 Price Per Unit 5.98

ORDERED			STOCK RECORD						
Date	Order No.	Quantity	Date	Requisition No.	Quantity Issued	Order No.	Quantity Received	Balance on Hand	Cost Value Price x Balance
			1/1					350	2,093.00
			9/25	487	250				
10/2	1671	380	10/15			650	380		
			11/5	206	126 1/2				

ARTICLE Indoor-Outdoor Lights SOURCE Festive Lighting Co., Inc.
205 Sparkle Ave.
Twinkleville, NJ 12001

Stock Number 437 Unit D02. Minimum Quantity 80 Maximum Quantity 400 Price Per Unit 9.98

ORDERED			STOCK RECORD						
Date	Order No.	Quantity	Date	Requisition No.	Quantity Issued	Order No.	Quantity Received	Balance on Hand	Cost Value Price x Balance
			1/1					100	998.00
2/10	861	300	3/10			861	300		
			7/18	47A	80 1/2				

ARTICLE Stockings SOURCE Felt Makers, Inc.
704 Redwood Dr.
Bakerfield, Missouri 4076

Stock Number 438 Unit D02. Minimum Quantity 40 D02. Maximum Quantity 300 Price Per Unit 4.98

ORDERED			STOCK RECORD						
Date	Order No.	Quantity	Date	Requisition No.	Quantity Issued	Order No.	Quantity Received	Balance on Hand	Cost Value Price x Balance
			1/1					100	498.00
			3/21	486	20				
6/30	864	220	7/18			864	220		
			10/16	50A	60				

ARTICLE Christmas Candles SOURCE Wilbournes, Wax Works
Woodie Drive
Walla Walla, Washington

Stock Number	Unit	Minimum Quantity	Maximum Quantity	Price Per Unit
C666D	D02.	240	1260	15.00

ORDERED			STOCK RECORD						
Date	Order No.	Quantity	Date	Requisition No.	Quantity Issued	Order No.	Quantity Received	Balance on Hand	Cost Value Price x Balance
			1/1					300	4500.00
2/10	695	800	3/12			695	800		
			9/28	1071	525				

ARTICLE Santa Suits SOURCE Welsh Products, Inc
688 Galax Avenue
Portland, Maine

Stock Number	Unit	Minimum Quantity	Maximum Quantity	Price Per Unit
6328J	Each	50	200	35.50

ORDERED			STOCK RECORD						
Date	Order No.	Quantity	Date	Requisition No.	Quantity Issued	Order No.	Quantity Received	Balance on Hand	Cost Value Price x Balance
			1/1					52	1846.00
2/10	696	100	3/20			696	100		
			10/2	1201	63				

ARTICLE Mistletoe Sprays SOURCE Plastic Products Corporation
23791 Longhorn Ave.
Houston, Texas 77021

Stock Number P865J Unit D02. Minimum Quantity 55 Maximum Quantity 250 Price Per Unit .85

ORDERED			STOCK RECORD						
Date	Order No.	Quantity	Date	Requisition No.	Quantity Issued	Order No.	Quantity Received	Balance on Hand	Cost Value Price x Balance
			1/1					65	55.25
2/10	693	150	3/2			693	150		
			8/8	1033	110				
				1222	45				

ARTICLE Holly Wreaths SOURCE Plastic Products Corp.
23791 Longhorn Ave.
Houston, Texas 77021

Stock Number R693X Unit D02. Minimum Quantity 60 Maximum Quantity 300 Price Per Unit 4.22

ORDERED			STOCK RECORD						
Date	Order No.	Quantity	Date	Requisition No.	Quantity Issued	Order No.	Quantity Received	Balance on Hand	Cost Value Price x Balance
			1/1					70	295.40
2/10	694	200	2/25			694	200		
			10/28	1196	206 1/2				

TO _____ DATE _____

____ For Your Information ____ As Requested

____ For Your Files ____ Return to _____

____ For Your Signature ____ Please Share

__x__ Please Handle ____ Thank You

____ Your Reaction Please

REMARKS: _____

Please make a reservation for me and my wife at the Holiday Inn, 1001 Gulf Road, Tampa, FL., for December 26-31.

We plan to arrive late in the afternoon of the 26th and depart early in the morning of the 31st.

Please request that the room have two double beds and a view overlooking the gulf.

Ask for a confirmation of the reservation.

Leave me a written note. St. Nick

A PROBLEM IN HUMAN RELATIONS

OCCURS IN THE OFFICE

The last day before the holiday arrives, Mr. St. Nick comes into your department to extend the season's greetings to each employee and to personally distribute Christmas bonus checks. After he leaves, the five clerk typists eagerly open their envelopes to see the amount of their gift. You overhear two girs discussing the amount of their bonus, and you realize that one girl (who was employed the same day you were) has received $100 more than you received! You feel that you have worked hard all year, and you cannot understand why your co-worker's bonus is so much more than yours. What should you do?

In the space provided, briefly discuss the good and/or bad points of each of the alternatives presented.

1. Go talk with your co-workers and tell them that bonus checks are suppose to be confidential and they should not have been discussing theirs with each other. _____
_____
_____

2. Go talk with your co-worker nicely to see if she knows why her check would be for a larger amount than yours. _____
_____
_____

3. Go talk with the cashier to see if a possible mistake was made in issuing the check and the amounts should have been the same.
_____
_____
_____

4. Go talk with Mr. St. Nick to see if your work has been satisfactory, and if so, ask him why your check was lower than that of your co-worker. _____
_____
_____

5. Say nothing to anyone, and go home determined to work harder next year and hope you will get more money. _____
_____
_____

WHICH ALTERNATIVE WOULD YOU CHOOSE? _____

If you do not like any of the alternatives given, what would you do in this situation? _____

_____

_____

MAILING LIST SITUATION

Send the following message to those persons on the attached list for a January 1 mailing.

Date

Date _____

Happy New Year!

It was a pleasure doing business with you during the past holiday season. We look forward to the coming year and the opportunity of serving you again.
Our latest HOLIDAY SHOP catalog is on its way to you.

Cordially,

THE HOLIDAY SHOP

---

1. Address post cards from mailing list. Use two letter state abbreviations.

2. Use your business return address.

3. Type message on reverse side.

4. Name of shop typed a triple space below complimentary closing replaces signature.

5. Upon completion, alphabetize the post cards and put the number on the attached answer sheet.

THE HOLIDAY SHOP

MAILING LIST

1. Duane C. Reinhard, M.D.
1902 Mount View Drive
Anchorage, Alaska 99501

2. James D'Alton
861 Main Street
Roswell, New Mexico 88201

3. Brian Sutton-Smith, Ph. D.
Terminal Building
Boise, Idaho 83702

4. Alvina O'Konski
2609 Lake Shore Blvd.
Duluth, Minnesota 55804

5. Rev. Charles Sutts
71 Main Avenue
Biloxi, Mississippi 39530

6. Sena Ward
1396 Penn Road
Altona, Pennsylvania 16601

7. John Matthew
8886 Winston Lane
Albany, New York 12219

8. Charles S. DuVail
3694 Academy Boulevard
Annapolis, Maryland 21406

9. W. C. LaFayette
222 Drake Avenue
Flagstaff, Arizona 86001

10. Donald R. Lehman
4336 Dudley Drive
Lincoln, Nebraska 68503

11. Helmut Cron
61 Elm Avenue
Concord, New Hampshire 03301

12. Donald R. Amburn
5887 Sherwood Road
Houston, Texas 77201

13. Jack Spratt
Commons Building
Boston, Massachusetts 02124

14. Leonard Young
2056 Broadview Drive
Lincoln, Nebraska 68505

15. Mrs. Brenda O'Brien
1369 Ocean Road
Atlantic City, New Jersey 07401

16. G. David Riddell
Maine Terminal Tower
Portland, Maine 04101

17. Lynn E. DePuis
62 York Lane
Muskogee, Oklahoma 74401

18. Leonard Lineberry
988 Broadview Drive
Lincoln, Nebraska 68505

19. Jerome Richard
1360 Ocean Breeze Way
Ewa Beach, Hawaii 96706

20. Oscar VanderBosch
19 Second Avenue
Battle Creek, Michigan 49014

21. Laurol J. St. Clair
4202 Wayne Blvd.
Fort Wayne, Indiana 46811

22. F. Edward Dupuis
9905 Euclid Road
Evanston, Illinois 60201

23. Ms. Elizabeth Francis
Eugene Children's Hospital
Eugene, Oregon 97401

24. Ms. Anne E. Schmidt
8888 Berkeley Lane, NW
Fort Smith, Arkansas 72901

THE HOLIDAY SHOP

MAILING LIST -- Continued

25. Vernon J. Sutton
Southern View Bldg.
Augusta, Georgia 30904

26. Mrs. Herman Stable
8102 Rockway Drive
Akron, Ohio 44309

27. Charles Duvall
1606 News Building
Independence, Mo. 64051

28. Benedict Lafayette
19 Lake Street
Baton Rouge, La. 70810

29. Carl Okonski
2103 Cottage Grove
Memphis, Tennessee 38104

30. Alex St. George, Sr.
Professional Building
Cedar Rapids, Iowa 52403

31. Alex Gillespie, Jr.
2204 Berkeley Blvd.
Berkeley, California 94710

32. Fred H. Reinhart
Bous' Athletic Center
Huntsville, Alabama 35802

33. Mrs. Ella D'Alton
Y.W.C.A.
Bismark, N.D. 58501

34. Al O'Konski
519 Main Street
Las Vegas, Nevada 89101

35. Bill A. Stahl
16 Columbia Parkway
Columbia, S.C.

36. Mrs. Rita Teinhart
Child Health Center
Hampton, Virginia 23361

HOLIDAY SHOP
TEACHER'S KEY

I. Composition

1. Letter to Mr. Bernard Austin -- Check for $10.43 enclosed.
2. Letter to Miss Florence Holly and Statewide Insurance Company.
3. Letter to Mr. Sam Midgett -- Invoice enclosed for $822.70.
4. Letter to Mr. George Gorge -- Invoice enclosed for $34.08.
5. Letter to Mr. Harry Redd -- Invoice enclosed for $7.55.
6. Letter to Mrs. Betty Green -- check enclosed for $39.00
7. Letter to Mr. John Jones and telegrams to Northwest Freight Lines and Homeland Express Company.

II. Calculations

Stock Inventory Extensions

ITEMS	EXTENSIONS	
	BALANCE ON HAND	COST VALUE
Tree Ornaments	800	7200.00
	554	4986.00
	342.5	3082.50
Christmas bells	100	598.00
	480	2870.40
	353.5	2113.93
Indoor-Outdoor lights	400	3992.00
	319.5	3188.61
Stockings	80	398.40
	300	1494.00
	240	1195.20
Christmas candles	1100	16500.00
	575	8625.00
Santa suits	152	5396.00
	89	3159.50
Mistletoe sprays	215	182.75
	105	89.25
	60	51.00
Holly wreaths	270	1139.40
	63.5	267.97

8. Letter composed from Charles B. St. Nick to Plastic Products Corporation, 23791 Longhorn Avenue, Houston, TX 77201, ordering 190 dozen #P865J, Mistletoe Sprays, and 236.5 dozen #4693X, Holly Wreaths.

9. Note on reservations.

III. Filing

1.

2.

3.

4.

5.

6.

7.

Note to teacher: The letters should be evaluated as mailable or not mailable.

HOLIDAY SHOP

Answer Sheet for Postal Cards

Directions: Alphabetize the postal cards and list the card number on the blank spaces.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____
25. _____
26. _____
27. _____
28. _____
29. _____
30. _____
31. _____
32. _____
33. _____
34. _____
35. _____
36. _____

Activities and procedures within the Division of Vocational Education are governed by the philosophy of simple fairness to all. Therefore, the policy of the Division is that all operations will be performed without regard to race, sex, color, national origin, or handicap.